Federal Acquisition Service

Request for Quote (RFQ)

GSA Training Module Developed for NITCP

RFQ Training Module Overview

Description: This training module will take you step-by-step through the Request for Quote (RFQ) document in the Regional Business Application (RBA) IT-Solutions Shop (ITSS) component as well as the integrated RBA & e-Buy Solicitation Process.

RFQ Glossary

Term	Definition
RFQ	Request For Quote - If RFQ is published in ITSS, then contractors will submit quotes in ITSS. If the RFQ is published in e-Buy then contractors will submit quotes in e-Buy.
RFI	Request For Information – Checking the 'Sources Sought' option on the BOMSOW/Order Mod for an RFQ being published in e-Buy delineates a RFI. Contactors will not be required to provide dollar amounts on their quote responses and a Market Analysis cannot be generated from the RFI once closed.
Sources Sought	If 'Publish in e-Buy' on a BOMSOW/Order Mod is set to Yes, this option determines whether users would like it to be an RFI (Sources Sought = Yes) or RFQ (Sources Sought = No).
Quote Due Date & Time	The date and time that the bidding process ends.
No Bid	Option for Contractor to notify CSR they are not participating in specified RFQ.
Quote Summary for Unregistered Contractors	ITSS page that is generated after RFQ process is closed on an e-Buy published RFQ. Lists quote information submitted by Contractors who weren't registered in ITSS at the time the RFQ was closed.
Faxed Quote	Quote that CSR submits on Contractor's behalf after the RFQ has been closed.

ITSS RFQ Privileges

user Role	Action	Create	Edit	View
GSA user	✔	✔	✔
Client			✔
Contractor			✔*

*Contractors may only view pre-award if on BOMSOW Contractor List

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| WELCOME | ORDERS | FUNDING | REGISTRATION | CONTRACTS |

Select a View:

| <<-- View Orders -->> ▾ | <<-- View Inactive Orders -->> ▾ | <<-- View Action Items -->> ▾ | <<-- View Support Information -->> ▾ |

Go to a Specific View Item: [_____] [Go]   Create New Order

Orders - Entire Package

Next -> |

▾ Order Package
   ▾ ID40120042-COI Sarah Client (Organization Name) Quote Selected>>IT Commodities
      00 Chronology
    ▸ 01 Electronic Contract File (ECF)
    ▾ 01 BOM/SOW ID40120042 - 000 Version 00 Amendment 00 ANALYSIS COMPLETE
      ▾ RFQ Modification 000 Version 00 Amendment 00 GSA APPROVED
         Quote Ver 00 Rev 00 for Steve Contractor (IT INDUSTRY PARTNERS) Cnt# << Open Market >>, BID=$11,444.00
         Quote Ver 00 Rev 00 for Jim Contractor (TEST COMPANY CORP INC) Cnt# 263-97-D-0313, BID=$30,000.00
         Quote Ver 00 Rev 00 for Mary Contractor (CONTRACTOR COMPANY) Cnt# << Open Market >>, BID=$15,000.00
         *Market Analysis Version 00 - Recommendation Rejected
         *Market Analysis Version 00 - Quote Selected: Steve Contractor - IT INDUSTRY PARTNERS (<< Open Market >>), $12,817.28

Click on the RFQ link in the Order Package View to open an existing RFQ in view mode

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Within the Pre-Award Workflow Context
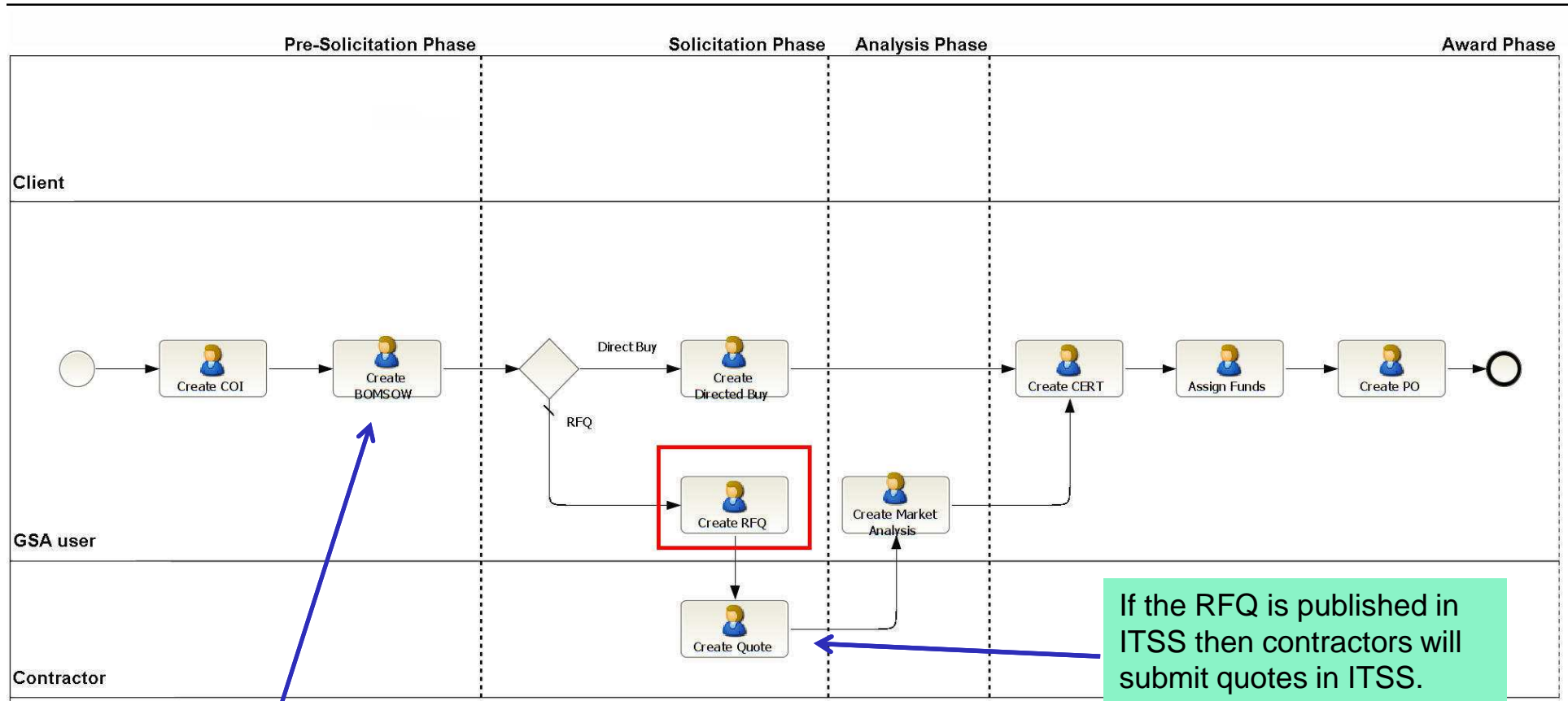
The user indicates on the BOMSOW if they would like to publish the RFQ in e-Buy. Publishing an RFI/RFQ in e-Buy complies with Section 803 (Defense Authorization Act of 2002) which requires Department of Defense (DoD) agencies to seek a broad range of competition.

If the RFQ is published in ITSS then contractors will submit quotes in ITSS.

If the RFI/RFQ is published in e-Buy then contractors will submit quotes in e-Buy.

e-Buy Overview

➢ ITSS & e-Buy are integrated to allow:
  - GSA to publish ITSS RFQs & RFIs in e-Buy
  - Contractors to view & bid on opportunities from ITSS in e-Buy

➢ e-Buy provides compliance with Section 803 which requires DoD agencies to seek a broad range of competition. All e-Buy registered contractors can view/bid on *all* RFQs published in e-Buy.

➢ Web Services technology allows the RBA (and other external applications) to post RFQs to e-Buy and to import e-Buy quotes back into the application:

  This e-Buy feature is called ***e-Buy Connect***.

RBA & e-Buy Solicitation Process
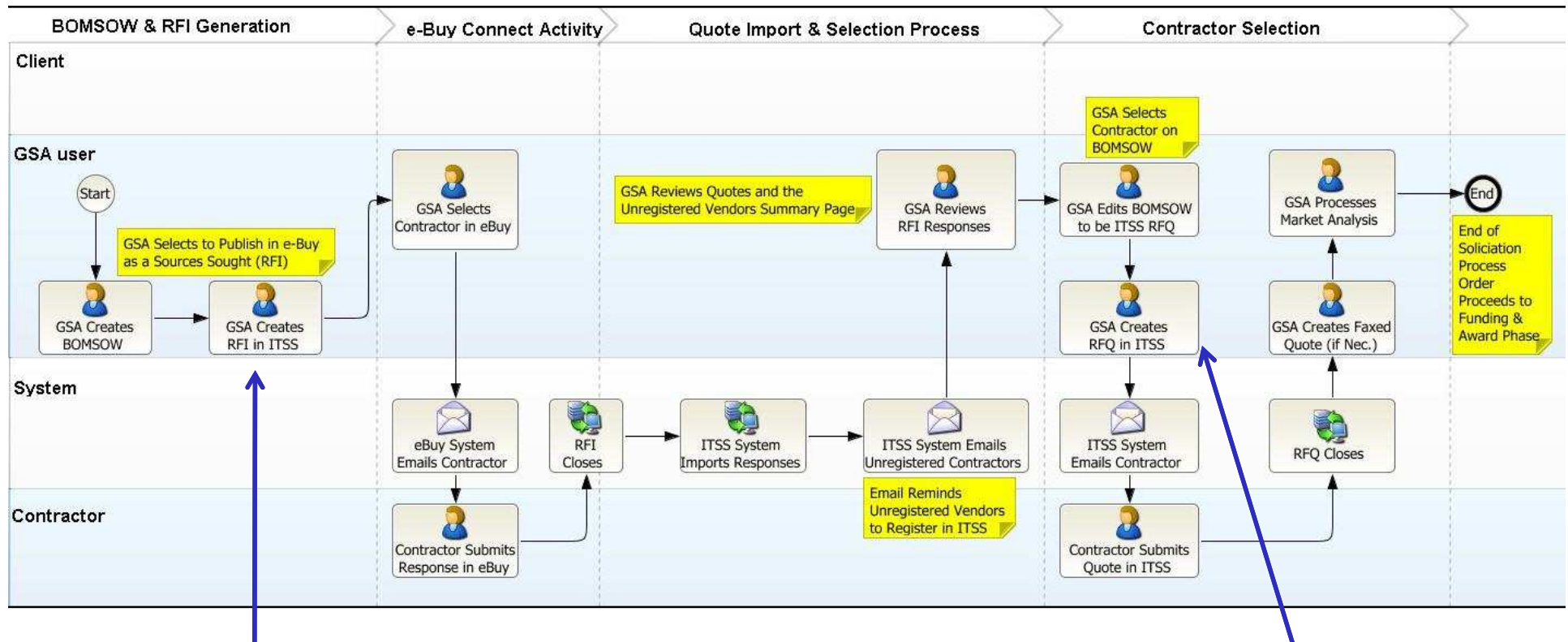
Create a Request for Information (RFI) in ITSS by setting Sources Sought = Yes on the BOMSOW

Create a Request for Quote (RFQ) in ITSS by setting Sources Sought = No on the BOMSOW

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Publishing an RFQ in ITSS

On BOMSOW,
If *No* is selected, then the
RFQ will be published in ITSS

Publish in e-Buy: ⦿ Would you like to publish this opportunity as an RFQ in e-Buy?
○ Yes ◉ No

If Yes, you will select contractors within e-Buy after you submit the RFQ in ITSS.

Contractor List: ⦿ <<------------------------------------ List ------------------------------------>>
Steve Contractor (IT INDUSTRY PARTNERS)
Mary Contractor (CONTRACTOR COMPANY)

Pick From List   **Clear the List**

Highlighted entries will be saved. To highlight multiple entries, hold down the control key.

Contractor selection occurs on the BOMSOW via the Contractor pick list.

Desired contractors must be *selected* (highlighted in blue) in order to be issued the RFQ.

Create an RFQ by clicking the *Request Quote* button on the top of the *submitted* BOMSOW

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WELCOME   **ORDERS**   **FUNDING**   **REGISTRATION**   **CONTRACTS**

Bill of Materials / Statement of Work

| Govt. Est | Directed Buy | Request Quote | Edit | Go To Order Package |

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WELCOME | ORDERS | FUNDING | REGISTRATION | CONTRACTS

Request for Quote

RFQ status

| Submit | Close Without Saving |

Submitted By: Christopher CSR at 02/27/2012
Order ID: ID40120044, Mod 000, Version 00, Amendment 00
Client Rep: Sarah Client (Organization Name)
Status: **Quotes Requested**
Publish in e-Buy: No

Click the BOMSOW link to review requirements as well as all task item details

All task items (both active and inactive) on the BOMSOW are displayed on the RFQ for contractor bidding

Review the Bill of Material or Statement of Work
Review the Client Order

👉 All Fields marked with 🟡 are required.

Project Descriptor: IT Commodities procurement

Task Items:

Fiscal Task Type ‡	Item No. ▲	Description ‡	POP From Date ‡	POP To Date ‡	Delivery Date ‡
FFP	1001	Installation / Maintenance - Base Year	03/01/2012	02/28/2013	n/a
COM	1002	Mobile Solutions Equipment	n/a	n/a	03/01/2012
FFP	2001	Maintenance - Option Year 1	03/01/2013	02/28/2014	n/a
FFP	3001	Maintenance - Option Year 2	03/01/2014	02/28/2015	n/a

Comments:

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The RFQ close date and time

Quote Due Date & Time:
Date: 02/29/2012
Time: 07 : 00 PM Eastern Standard Time

Client View of Quotes: ● Show All Quotes ○ Show No Quotes ○ Only Show Winner

GSA View of Quotes: ● All of Region ○ Defined on Order

Primary Contractor List: [Steve Contractor, Mary Contractor, Jim Contractor]

Notify Cust Reps On Submitted Quote(s): ● Yes ○ No

Point of Contact: Christopher CSR

Contact Phone: (877) 472-4877

Contact E-Mail: Christopher.CSR@nowher

▶ Edit History

Submit   Close Without Saving

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Restrict the client's view privileges to quotes to:
• View all quotes
• View no quotes
• View only the winning quote

Allow all GSA users in the region to view the quotes or only the users on the COI

If CSRs on the order want to be automatically emailed when a quote is submitted then click *Yes* to "Notify Cust Reps…" (does not apply for RFQs published in e-Buy).

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Publishing an RFI/RFQ in e-Buy

If *Yes* is selected, then the RFQ will be created in ITSS and subsequently published in e-Buy via e-Buy Connect

Contractor selection occurs in e-Buy *after* creating the RFQ in ITSS

Create an RFI by selecting *Yes*

Publish in e-Buy: Would you like to publish this opportunity as an RFQ in e-Buy?
  ◉ Yes ○ No

If Yes, you will select contractors within e-Buy after you submit the RFQ in ITSS.

Sources Sought: Post as a Sources Sought or Request for Information (RFI) notice?
  ○ Yes ◉ No

Contractor List: <Contractor selection is not required in ITSS at this time>

Create an RFQ/RFI by clicking the RFQ button on the top of the submitted BOMSOW

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WELCOME | ORDERS | FUNDING | REGISTRATION | CONTRACTS

Bill of Materials / Statement of Work

| Govt. Est | Directed Buy | Request Quote | Edit | Go To Order Package |

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| WELCOME | ORDERS | FUNDING | REGISTRATION | CONTRACTS |

Request for Quote

[Submit]   [Close Without Saving]

Submitted By:	Christopher CSR at 02/27/2012
Order ID:	ID40120044, Mod 000, Version 00, Amendement 00
Client Rep:	Sarah Client (Organization Name)
Status:	Quotes Requested - RFQ Published in e-Buy
Publish in e-Buy:	Yes
Sources Sought:	No

If Sources Sought is No then the solicitation has been issued as an RFQ.

If Sources Sought is Yes then the solicitation has been issued as an RFI.

Review the Bill of Material or Statement of Work
Review the Client Order

☞ All Fields marked with 🟡 are required.

Project Descriptor: IT Commodities procurement

Task Items:

Task Items on the RFQ will be sent to e-Buy as line items

Fiscal Task Type ‡	Item No. ▲	Description ‡	POP From Date ‡	POP To Date ‡	Delivery Date ‡
FFP	1001	Installation / Maintenance - Base Year	03/01/2012	02/28/2013	n/a
COM	1002	Mobile Solutions Equipment	n/a	n/a	03/01/2012
FFP	2001	Maintenance - Option Year 1	03/01/2013	02/28/2014	n/a
FFP	3001	Maintenance - Option Year 2	03/01/2014	02/28/2015	n/a

Comments:

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RFIs/RFQs published in e-Buy can only close on the hour

Quote Due Date & Time:
Date: 03/05/2012
Time: 07 : 00 PM Eastern Standard Time

Pick Quote Due Date wisely: RFIs/RFQs published in e-Buy cannot close early; they can only be extended

Note: If publishing in e-Buy, minimum solicitation open time is 49 hours.

Client View of Quotes: ● Show All Quotes ○ Show No Quotes ○ Only Show Winner

GSA View of Quotes: ● All of Region ○ Defined on Order

Primary Contractor List: <You will be prompted to select contractors in e-Buy upon submission of this form>

Notify Cust Reps On Submitted Quote(s): No

This setting not available for RFIs/RFQs published in e-Buy. CSRs will **not** be notified when Contractors submit quotes in e-Buy.

Point of Contact: Christopher CSR

Contact Phone: (877) 472-4877

Contact E-Mail: Christopher.CSR@nowher

▶ **Edit History**

[Submit] [Close Without Saving]

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em No.	Description ⬍	POP From Date ⬍	POP To Date ⬍	Delive
1001	Installation / Maintenance - Base Year	03/02/2012	02/28/2013	
1002	Mobi			03/0
2001	Main			
3001	Main			

e-Buy Data Transmission in progress...

Please wait while the order information is transmitted to e-Buy.

st 255 charact
Buy data trans

1. A popup will notify the user that data is being transmitted to e-Buy

2. ITSS will display a confirmation page

3. e-Buy Connect will open in a new browser window where GSA user completes the RFQ submission

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WELCOME   ORDERS   FUNDING   REGISTRATION   CONTRACTS

ACTION COMPLETED

The Selected RFQ on Order# ID40120044-000 has been submitted successfully in ITSS.

Please proceed to e-Buy Connect to view the Solicitation/RFQ page. A new browser window will open momentarily.

Return to RFQ | Order Package | Wel

Select an option above to return to IT

GSA e-Buy. Connect   Rfq Information | Close Connect Session

Step 2. RFQ Information

Instructions: Please review your RFQ information below.

Reminder: In order to satisfy FAR requirements, you should request quotes from at least three (3) vendors for orders exceeding the micro-purchase threshold (FAR 8.405-1). Attach justification/documentation if restricting consideration to limited sources or limiting to an item peculiar to one manufacturer (i.e. brand name), as required by paragraphs (a) or (b) of (FAR 8.405-6).

Categories Selected: Vendors Remove
▷ Add Category   selected Category

RFQ ID	Reference #
RFQ236371	ID40120099__62672

RFQ Title
IT commodities procurement

RFQ Close Date	Delivery
03/01/2012 07:00:00 PM EST	Period of Performance 03/02/2012 through 02/28/2015

Line Items

Mfr. part No/NSN/Item		Manufacturer	Product/Service Name	Qty	Unit	Ship Address
Fiscal Task Type: FFP; Task Item Num:1001	POP From:03/02/2012-POP To:02/28/2013	Installation / Maintenance - Base Year	1	EA	(1)
Fiscal Task Type: COM; Task Item Num:1002	Delivery Date:03/01/2012	Mobile Solutions Equipment	1	EA	(1)
Fiscal Task Type: FFP; Task Item Num:2001	POP From:03/01/2013-POP To:02/28/2014	Maintenance - Option Year 1	1	EA	(1)
Fiscal Task Type: FFP; Task Item Num:3001	POP From:03/01/2014-POP To:02/28/2015	Maintenance - Option Year 2	1	EA	(1)

Description
Order summary text
To submit a quote for this RFQ, you must be registered in the Assisted Acquisition Services Business System (AASBS). (Please Note: Registration must be completed using the same Username (first/last name), Vendor Company, Duns Number, and Contract Number referenced in the Quote submittal). Additionally, please submit your quote using only the line items on the RFQ. Any additional line items added to your quote will be ignored and will not be considered or displayed in IT-Solutions.

Attached Documents:

Shipping Address
(1) Address1:
GSA
GSA Region 31
31 IWAC Rd.
Arlington, VA 22204
United States

Individual Receiving Shipment
Christopher CSR
(877) 472-4877
Christopher.CSR@nowhere.techflow.com

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GSA **e-Buy** Connect

Rfq Information | Close Connect Session

Step 2. RFQ Information

Instructions: Please review your RFQ information below.

Reminder: In order to satisfy FAR requirements, you should request quotes from at least three (3) vendors for orders exceeding the micro-purchase threshold (FAR 8.405-1). Attach justific... manufacturer (i.e. brand name), as requ...

Categories Selected:

▶ Add Category

RFQ ID
RFQ236371

RFQ Title
IT commodities procurement

RFQ Close Date
03/01/2012 07:00:00 PM EST

Delivery
Period of Performance 03/02/2012 through 02/28/2015

RFIs/RFQs display task item data as line items in e-Buy.

The e-Buy *Line Items* table headers reflect e-buy line item information (Mfr. Part No/ NSN/ Item, Manufacturer, Product/Service Name, etc). When ITSS exports task item data, e-Buy imports the task item data and fits it into the table. Therefore, the e-Buy line item table headers do not necessarily reflect the ITSS task item data displayed.

Line Items

Mfr. part No/NSN/Item	Manufacturer	Product/Service Name	Qty	Unit	Ship Address
Fiscal Task Type: FFP; Task Item Num:1001	POP From:03/02/2012-POP To:02/28/2013	Installation / Maintenance - Base Year	1	EA	(1)
Fiscal Task Type: COM; Task Item Num:1002	Delivery Date:03/01/2012	Mobile Solutions Equipment	1	EA	(1)
Fiscal Task Type: FFP; Task Item Num:2001	POP From:03/01/2013-POP To:02/28/2014	Maintenance - Option Year 1	1	EA	(1)
Fiscal Task Type: FFP; Task Item Num:3001	POP From:03/01/2014-POP To:02/28/2015	Maintenance - Option Year 2	1	EA	(1)

Description
Order summary text
To submit a quote for this RFQ, you must be registered in the Assisted Acquisition Services Business System (AASBS). (Please Note: Registration must be completed using the same Username (first/last name), Vendor Company, Duns Number, and Contract Number referenced in the Quote submittal). Additionally, please submit your quote using only the line items on the RFQ. Any additional line items added to your quote will be ignored and will not be considered or displayed in IT-Solutions.

Attached Documents:

Shipping Address
(1) Address1:
GSA
GSA Region 31
31 IWAC Rd.
Arlington, VA 22204
United States

Individual Receiving Shipment
Christopher CSR
(877) 472-4877
Christopher.CSR@nowhere.techflow.com

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Add contractors by clicking *Add Category*

GSA *e-Buy*. **Connect**

Rfq Information | Close Connect Session

S tep 2. RFQ Information

Instructions: Please review your RFQ information below.

Reminder: In order to satisfy FAR requirements, you should request quotes from at least three (3) vendors for orders exceeding the micro-purchase threshold (FAR 8.405-1). Attach justification/documentation if restricting consideration to limited sources or limiting to an item peculiar to one manufacturer (i.e. brand name), as required by paragraphs (a) or (b) of (FAR 8.405-6).

Categories Selected:

▷ **Add Category**

Vendors selected | Remove Category

RFQ ID	Reference #
RFQ236371	ID40120044 __ 62672

RFQ Title
IT commodities procurement

RFQ Status	Delivery Days
Open	Period of Performance 03/02/2012 through 02/28/2015

RFQ Issue Date	RFQ Close Date
02/27/2012 11:54:10 PM EST	03/01/2012 07:00:00 PM EST

Line Items

Mfr. part No/NSN/Item	Manufacturer	Product/Service Name	Qty	Unit	Ship Address
Fiscal Task Type: FFP; Task Item Num:1001	POP From:03/02/2012-POP To:02/28/2013	Installation / Maintenance - Base Year	1	EA	1
Fiscal Task Type: COM; Task Item Num:1002	Delivery Date:03/01/2012	Mobile Solutions Equipment	1	EA	1
Fiscal Task Type: FFP; Task Item Num:2001	POP From:03/01/2013-POP To:02/28/2014	Maintenance - Option Year 1	1	EA	1
Fiscal Task Type: FFP; Task Item Num:3001	POP From:03/01/2014-POP To:02/28/2015	Maintenance - Option Year 2	1	EA	1

Description
Order summary text
To submit a quote for this RFQ, you must be registered in the Assisted Acquisition Services Business System (AASBS). (Please Note: Registration must be completed using the same Username (first/last name), Vendor Company, Duns Number, and Contract Number referenced in the Quote submittal). Additionally, please submit your quote using only the line items on the RFQ. Any additional line items added to your quote will not be considered or displayed in IT-Solutions.

Attached Documents:

After adding contractors to the RFQ, click *Submit RFQ.* Based on e-Buy data validations, the GSA user may be prompted to submit the RFQ again.

Shipping Address
(1) Address1:
GSA
GSA Region 31
31 IWAC Rd.
Arlington, VA 22204
United States

Individual Receiving Shipment
Christopher CSR
(877) 472-4877
Christopher.CSR@nowhere.techflow.com

▷ **Submit RFQ**

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GSA e-Buy. Connect

My Rfqs | Close Connect Session

R FQ Summary

Selected vendor(s) were notified

RFQ Summary Page only loads when RFQ has been *fully* submitted. Email notifications have now been sent to the selected contractors by e-Buy Connect.

Click *Close Connect Session* link to close the browser window

RFQ ID RFQ236371	Reference # ID40120044__62672

RFQ Title
IT commodities procurement

RFQ Status Open	Delivery Days Period of Performance 03/02/2012 through 02/28/2015
RFQ Issue Date 02/27/2012 11:54:10 PM EST	RFQ Close Date 03/01/2012 07:00:00 PM EST

Line Items

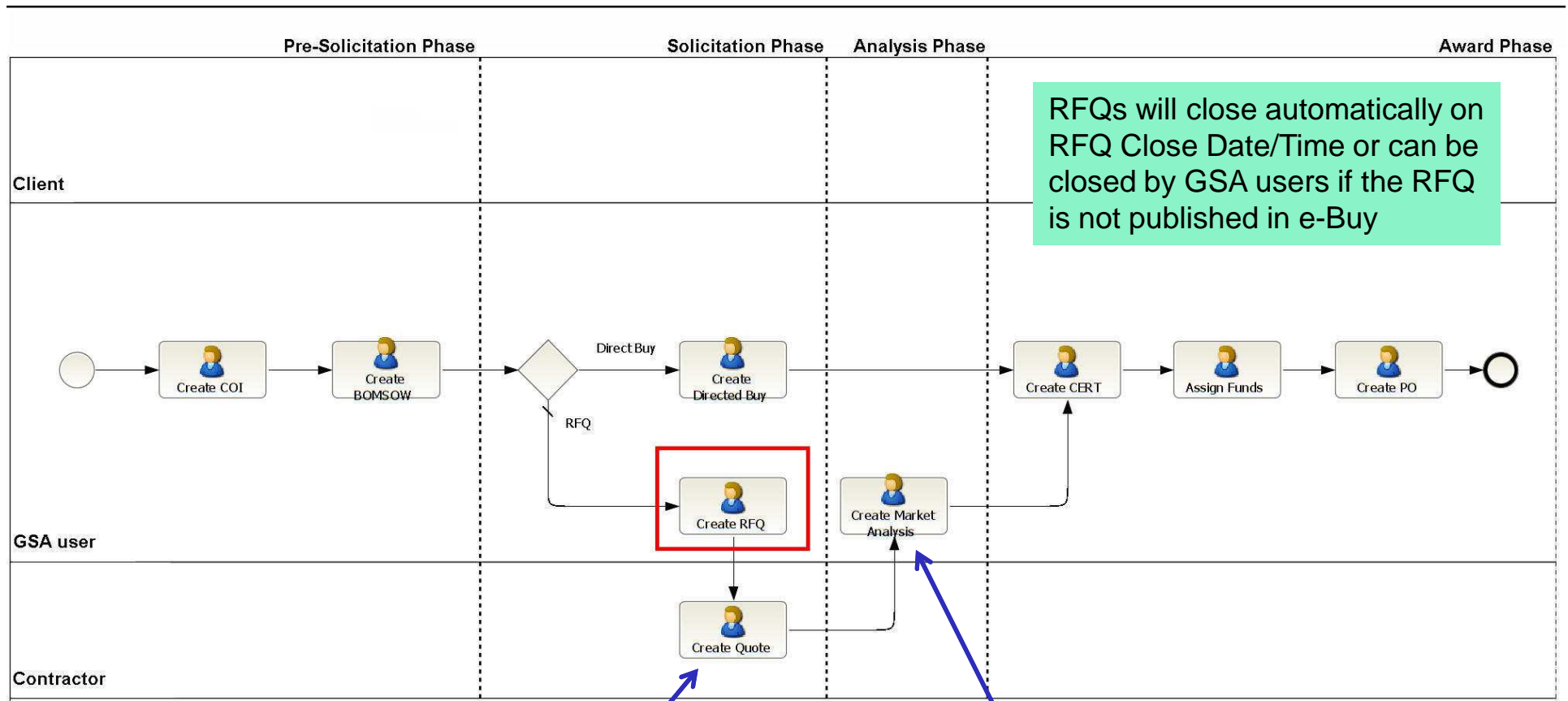| Mfr. part No/NSN/Item	Manufacturer	Product/Service Name	Qty	Unit	Ship Address
Fiscal Task Type: FFP; Task Item Num:1001	POP From:03/02/2012-POP To:02/28/2013	Installation / Maintenance - Base Year	1	EA	1
Fiscal Task Type: COM; Task Item Num:1002	Delivery Date:03/01/2012	Mobile Solutions Equipment	1	EA	1
Fiscal Task Type: FFP; Task Item Num:2001	POP From:03/01/2013-POP To:02/28/2014	Maintenance - Option Year 1	1	EA	1
Fiscal Task Type: FFP; Task Item Num:3001	POP From:03/01/2014-POP To:02/28/2015	Maintenance - Option Year 2	1	EA	1

Description
Order summary text
To submit a quote for this RFQ, you must be registered in the Assisted Acquisition Services Business System (AASBS). (Please Note: Registration must be completed using the same Username (first/last name), Vendor Company, Duns Number, and Contract Number referenced in the Quote submittal). Additionally, please submit your quote using only the line items on the RFQ. Any additional line items added to your quote will be ignored and will not be considered or displayed in IT-Solutions.

Attached Documents:

Shipping Address
(1) **Address1:**
GSA
GSA Region 31
31 IWAC Rd.
Arlington, VA 22204
United States

Individual Receiving Shipment
Christopher CSR
(877) 472-4877
Christopher.CSR@nowhere.techflow.com

Default message to Contractors that they must be registered in AAS Business Systems (AASBS)

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Closing the RFQ and Next Steps

Pre-Solicitation Phase | Solicitation Phase | Analysis Phase | Award Phase

Client

GSA user

Contractor

Create COI → Create BOMSOW → (decision) → Direct Buy → Create Directed Buy → Create CERT → Assign Funds → Create PO

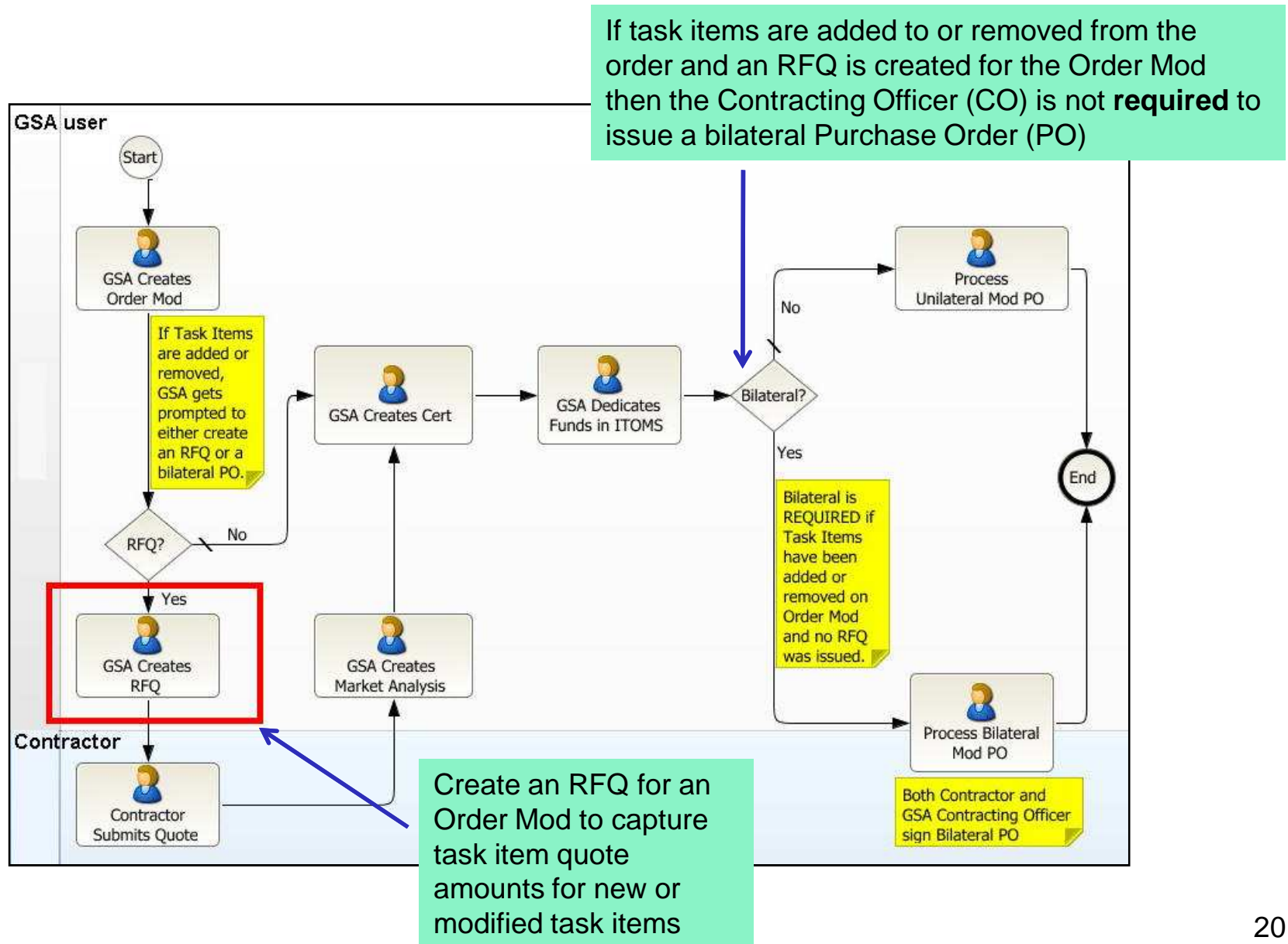RFQ → Create RFQ

Create Market Analysis

Create Quote

RFQs will close automatically on RFQ Close Date/Time or can be closed by GSA users if the RFQ is not published in e-Buy

Contractors are only able to submit and edit quotes in ITSS if the RFQ status is Quotes Requested

The Market Analysis comes after the RFQ has closed and quotes are available for analysis

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Within the Post-Award Workflow Context

If task items are added to or removed from the order and an RFQ is created for the Order Mod then the Contracting Officer (CO) is not **required** to issue a bilateral Purchase Order (PO)

Create an RFQ for an Order Mod to capture task item quote amounts for new or modified task items

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RFQ Status Glossary

Status	Definition
Quotes Requested	RFQ close date is later than current date.
Quotes Requested - RFQ Published in e-Buy	Publish in e-Buy option on BOMSOW has been set to 'Yes' and RFQ close date is later than current date.
Closed	RFQ close date is earlier than current date. GSA user can create a Faxed Quote or Market Analysis.
GSA Recommended	If Client Approval required on Market Analysis, Quote has been selected by GSA.
GSA Approved	Market Analysis has been submitted and no Client or Approving official is required.
GSA Rejected	Market Analysis has been rejected by selecting "No Contractor Selected." RFQ cannot be edited, reopened, or have another Market Analysis created from it.
Approving Official Approved	If GSA Approving Official required, GSA Approving Official has approved Market Analysis.
Approving Official Rejected	If GSA Approving Official required, GSA Approving Official has rejected Market Analysis.
Client Approved	If Client Approval required, Client has approved Market Analysis.
Client Rejected	If Client Approval required, Client has rejected Market Analysis.

Federal Acquisition Service

Questions & Support

➢ For questions regarding AAS Policy please contact randy.matlack@gsa.gov or robert.niewood@gsa.gov

➢ For questions regarding the RBA RFQ training module please contact RBA Technical Support:

Phone: (877) 472-4877

Email: AASBS.helpdesk@gsa.gov